



## Conference Services

### Offsite Event Planning Checklist & Timeline

What to Expect When Working With Conference Planner

#### Offsite Event Planning Checklist:

##### ☐ **First Steps:**

- Client point of contact schedules a meeting with the event planner (if applicable). Event planner will complete scope of work (intake). Client point of contact to provide initial meeting details such as:
  - Meeting history (if applicable) – if the meeting has occurred before, obtain the details of what was done, etc.).
  - How is the event being funded? (DOE or other)
  - Date of event.
  - Approximate number of attendees.
  - Establish division contact who will develop and manage website (if applicable).
  - Decide if there be online registration.
  - Determine meeting room set-up and audio visual needs.
  - Determine initial food and beverage needs.
  - Select caterer or coordinate with hotel catering, etc.
  - Develop draft budget of estimated costs.
  - Provide project ID. Make sure funds are in place before charges are made against the PID#.
  - If on-site support is needed.

##### **Specific Planning Details:**

- For meetings that exceed 30 attendees, conference services will oversee site visits and work with client point of contact to determine final venue.
- Client point of contact completes a valid search report/cost site comparison if the event is off-site.
- Client point of contact develops agenda and attendee list with affiliation and budget. This information is needed at the time the event is entered into the event approval database.
- Client point of contact enters event into event approval database.
- DOE Conference Reporting - client point of contact to work with conference services to enter event into the DOE database.
- Final guarantee (guest count) for hotels is typically 72 days before the event date.
- Hotel cut-off date for room reservations is typically 30 days before the event date.
- Event Planner assists client point of contact in coordinating guest rooms at hotels (if applicable).
- Event Planner assists client point of contact in coordinating transportation (if needed).
- Event Planner assists client point of contact in coordinating tours or other special accommodations (if needed).



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#### ☐ **Funding:**

- Determine if BZ accounts are needed. A BZ account is established for laboratory hosted and /or co-sponsored conferences. They are used to collect registration fees and other external funds. If the event needs a BZ account proceed to following steps:
  - BZ accounts MUST be established before on-line registration can be activated or any other funds collected.
  - Client point of contact completes request for BZ accounts. Forms are located on the Conference Services website.
  - Client point of contact includes event approval from database and budget to submit with BZ request form.
  - Client point of contact submits to assigned event planner or send directly to General Accounting.

#### ☐ **Registration:**

- Once BZ accounts have been established, complete registration packet and submit to the assigned conference planner.
- Event Planner has 5 days from the date the registration packet is received to build the site. Test page will be sent to the client point of contact and program chair for review and approval.
- Once approved, the registration site is activated and officially opened. The site is managed by the assigned event planner.
- With meetings exceeding 30 people conference services will create and print namebadges.

#### ☐ **After The Event Concludes:**

- Client point of contact to schedule a de-brief meeting with planner.

#### ☐ **Close Out Of Event/Accounting:**

- Obtain all final invoices related to the event within 30 days after event concludes.
- Conference Services and client point of contact will review all itemized event costs.
- Conference Services to coordinate with the division and decide method of payment.
- Final invoices to be paid within 30 days of receipt.
- If BZ accounts are used the event needs to be officially closed out. Close outs occur after ALL revenue has been collected and all costs paid in order to zero out the BZ projects for that event. This in turn clears the event and it's officially closed out.



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STEP	ACTION	WHEN	WHO	NOTES
1	Select Event Date	First step before any planning occurs	Client point of contact	
2	Provide PID# to conference services	Up front when planning starts	Client point of contact	
3	Prepare and submit request for proposal (RFP)	Within 3 days of receiving preliminary meeting specifications (date, # of attendees etc.) from Client point of contact	Conference Services	
4	Conduct Site Visit	As soon as schedules allow	Client point of contact and Conference Services	
5	Receive proposals	Within 5 days of original RFP submitted by planner to venue	Conference Services	
6	Review proposals and select final site. Request contract from venue.	Immediately after receiving proposal	Conference Services	
7	Sign contract and submit deposit.	Within 3 days of receiving contract	Conference Services	Funds need to be in place at this time to pay deposit and other expenses. If BZ accounts needed, submit request at this time.
8	Hotel final guarantee (guest count)	Typically 72 days before the event date	Conference Services	
9	Hotel cut-off date (room reservations)	Typically 30 days before the event date	Conference Services	
10	Start selection of food, beverage and audio visual (AV)	Finalized at least 10 days prior to event date	Conference Services and client point of contact	Confirm # of attendees for accurate planning of food/beverage
11	Registration	As soon as hotel contract is signed, registration can be opened.	Client point of contact and Conference Services	IF BZ accounts needed, process before registration site is established.
12	De-Brief	Client point of contact to schedule de-brief meeting within 30 days of conclusion of event	Client point of contact	
13	Close Out	Within 30 days of conclusion of event	Client point of contact and Conference Services	See Event Checklist for specifics